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The training program for occupational therapy assistants should generally be 20 to 25 weeks in length and include a minimum of 750 clock hours allocated to academic instruction, skills instruction, practical experience and evaluation. The program director should be a registered occupational therapist qualified by education and experience for administration and teaching. A minimum of two additional registered occupational therapists should be included in the teaching staff. Programs may be conducted by hospitals, medical or social agencies, state, county, or city agencies, regional groups, or accredited junior colleges. Requirements are organized under headings of: (1) need, (2) sponsor, (3) liason with the American Occupational Therapy Association (AOTA), (4) planning, implementing, and consulting bodies, (5) staffing, (6) resources, (7) facilities and equipment, (8) training program, and (9) permanent records. The procedure for approval by AOTA is explained. Attachments include: (1) forms, (2) a training program content outline, (3) an analysis of the functions of the assistant, (4) a guide for supervision of the assistant, and (5) a schedule of fees for program approval procedures and consultation. (JK)

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AMERICAN OCCUPATIONAL THERAPY ASSOCIATION
~~251 Park Avenue South~~, New York, N.Y. 10010

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AOTA REQUIREMENTS OF A TRAINING PROGRAM

FOR

OCCUPATIONAL THERAPY ASSISTANTS.

February 1967

The American Occupational Therapy Association (hereinafter referred to as AOTA) has established requirements for the preparation of occupational therapy assistants. Programs meeting these requirements must be formally approved by the AOTA to enable their graduates to be certified as occupational therapy assistants. Such assistants are trained to work under the supervision of registered occupational therapists.

The AOTA's Committee on Occupational Therapy Assistants serves as a consulting reviewing, and evaluating body, working in liaison with the local program and the education office of the AOTA.

I. NEED

There must be an established need for occupational therapy assistants in the geographic area. Such a need may be ascertained by a survey of hospitals or agencies in the area which are present, or potential, employers of assistants.

II. SPONSOR

Training programs for assistants may be conducted by individual hospitals, medical, or social agencies; state, county, or city agencies, regional groups, or accredited junior colleges.

To be an acceptable location for a training program, sponsoring organizations or agencies should be staffed with properly accredited personnel appropriate to the setting. The existence of recognized educational and/or ongoing in-service training programs for other disciplines indicates an educational commitment.

III. LIAISON WITH AOTA

A statement of intent to initiate an occupational therapy assistant training program should be forwarded to the AOTA as soon as practicable. It should be accompanied by the tentative dates of the initial program to insure the visit of a survey team prior to the completion of the first class. Communication with AOTA should be maintained in order to avoid problems that may hinder or delay approval of the program.

On-site consultation may be arranged by AOTA. The requesting organization will bear the expense of this service. This assistance can be helpful in preliminary planning, when developing program content, or where there is a limited number of registered occupational therapists to assist in program development.

IV. PLANNING, IMPLEMENTING AND CONSULTING BODIES

Experience has shown that the strength and effective operation of any program are dependent upon the professional and community resources brought to bear during planning and implementation. These resources must also be available to the program director during continuing operation of the program. Functions which shall be their concern include planning, implementation, and consultation on professional, educational, financial, and public relations matters.

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This requirement shall be met by the establishment of one or more committees whose charge shall include initial development of program, selection of trainees, professional advice, and maintenance of standards. In addition to occupational therapists, membership of these committees shall include physicians, members of allied disciplines, and community leaders. Terms of service of committee members shall be of sufficient length to provide continuity. The director of the training program shall be an ex-officio member of these committees, and may serve as chairman of ad hoc and subcommittees, e.g., admissions.

V. STAFFING

The director who administers the training program shall be a registered occupational therapist, qualified by education and experience to administer and teach the principles and practices of occupational therapy.

A minimum of two additional registered occupational therapists shall be included on the occupational therapy teaching staff. They may be employed full- or part-time, or may be on loan from other institutions.

The program can be enriched by utilizing additional registered occupational therapists to assist with instruction.

Instructors of specialty skills shall have no more than fifteen trainees in a single workshop session. It is essential for trainees and faculty members to maintain close working relationships.

A member of the occupational therapy faculty shall be responsible for auditing classes given by other specialists for effective coordination and integration of program content. Each series of lectures shall be audited at least once.

Supervisors during the practical experience phase of the program are also faculty members and shall be registered occupational therapists.

Physicians and representatives from other appropriate disciplines who conduct lectures, discussion groups, clinics, and/or demonstrations shall be qualified in their specialty.

VI. RESOURCES

The training program shall have assurance of adequate financial support for effective implementation.

Depending upon the individual situation, the budget shall provide for: consultants' fee: salaries for administrative, teaching, and secretarial staff; honorariums; teaching aids and reference materials; supplies and equipment; overhead (rent and utilities); travel; and expenses associated with approval of the program.

VII. FACILITIES AND EQUIPMENT

Adequate facilities and equipment for efficient teaching shall be provided.

A. Adequate facilities shall include office space for the director and staff, space suitable for lectures, a workshop area, study space for students, and an easily accessible library. Such things as good lighting, sinks, electrical outlets, telephones, and readily accessible toilet facilities shall also be provided. The library shall contain books, pamphlets, and periodicals to supplement classroom teaching. Provision shall be made for annual acquisitions and subscriptions.

B. Adequate equipment shall include tools and supplies in sufficient quantity to insure a good learning situation. Audio-visual aids shall be available.

VIII. TRAINING PROGRAM

A. Admission Requirements shall be:

1. Education: Senior high-school graduation or high-school equivalency. (Satisfactory job experience and appropriate recommendations may occasionally be substituted for two years of education when the situation and potential of the applicant warrant.)

2. Health: Good physical and emotional health.

3. Age: Minimum age of eighteen years. Applicants over fifty-five years of age will not ordinarily be accepted unless exceptionally well qualified.

4. Personal Characteristics: Intelligence, maturity, emotional stability, flexibility, and ability to establish and maintain effective interpersonal relations.

B. Admission Procedures shall include:

1. A personal interview with the program director, or his designate.

2. Submission of the following: an application form, written personal references, validation of education, and a certificate of health. The validation of education, personal references, and the certificate of health need not be resubmitted if already available in the employment records of the agency sponsoring the training program. It is suggested that an Employer Reference Form and Medical Reference Form be used in programs that accept applicants from the community.

3. Final selection of trainees which shall be the responsibility of the admissions committee which shall include the director of program.

C. Public Information:

The organization offering the program shall provide a descriptive pamphlet or outline of the training program for the information of potential trainees.

To avoid misinterpretation of the purpose and status of a program, all press contacts and publications, including the one prepared for the information of potential trainees, shall be approved by the advisory committee or by the director of the program. Avoid statements that might lead the reader to believe a program

1. prepares trainees to work without proper supervision

2. has been approved prior to such action by the AOTA

3. has been, or will be certified when, in fact, it is the graduates of approved programs who are eligible for certification.

D. Trainees

1. The number of trainees accepted whall be determined by the number of personnel available for the training program and the facilities of the hospital or agency.

2. The director and the advisory committee shall reserve the right to drop a trainee at any time for any cause deemed sufficient.

E. Length of Program

Training programs for occupational therapy assistants shall be a MINIMUM of 750 clock hours, to be allocated as follows:

Academic Instruction	260 hours
Skills Instruction	230 hours
Practical Experience	250 hours
Evaluation	10 hours

The duration of the program shall be no less than 20 nor more than 25 consecutive weeks unless prior concurrence is obtained from the American Occupational Therapy Assoication.

F. Program Content

A program outline for training occupational therapy assistants has been developed and is available in a separate document. The didactic subjects listed in the outline are required, but allowance is made for an adjustment in the number of hours devoted to a given subject to accommodate the local situation and area of emphasis.

For clarity in presentation, the didactic subjects, skills, and practical experience have been presented in separate blocks of time. In actual experience and for ease in learning, however, these may be rearranged and integrated.

G. Centers for Practical Experience

Centers used shall have the setting, case load and program to provide a well defined practical experience.

1. Hospitals or organizations conducting the training program may integrate the didactic instruction and practical experience within their own center.

2. When the practical experience is not given within the same hospital or agency, the centers used for this purpose shall be carefully selected by the director of the training program and/or appropriate committee. Any occupational therapy department utilized shall have a compentent, registered occupational therapist, qualified to supervise trainees.

3. Supervisors of trainees shall be familiar with the content of didactic and skills phases of the program in order to facilitate correlation of all phases of training.

4. Pertinent information concerning the trainee shall be made available to the supervisor of practical experience prior to the trainee's arrival.

5. Reports covering the trainee's performance, adjustment, and attendance shall be submitted to the training program director upon completion of the practical experience.

6. The ratio of registered occupational therapists to occupational therapy assistant trainees shall be maintained at a level in keeping with good educational practice to insure an optimum learning experience for each trainee.

IX. APPROVAL PROCEDURE

Request for Approval must be submitted to AOTA as soon as practicable (See III.)

A. The application form for approval of the training program is available upon request from the Education Division, American Occupational Therapy Association, 251 Park Avenue South, New York, N.Y. 10010.

When request for approval is received, the director of the program will be sent the required number of forms to be completed. Each form must be accompanied by:

1. A brief description of the sponsoring organization including its resources and facilities.

2. A statement of the reason for the establishment of the training program.

3. A list of the advisory committee, including titles.

4. Description of selection procedure used.

5. A syllabus of the training program that includes the title of each unit, its objective(s), scope, and depth.

6. A description of each center to be used for practical experience.

7. A description of procedures to be used in evaluating the trainee in didactic, skills, and practical experience phases of the program.

8. Topical outlines of course content, including

   a. List of teaching techniques used.

   b. List of reading assignments.

   c. List of recommended student reference and resource materials.

   An effective way of meeting the requirements of number 8 above is to have each instructor and lecturer complete a form. (A suggested "Unit Outline" is appended and may be duplicated.)

B. The survey team consists of two registered occupational therapists who have an understanding of both the educational and clinical practice areas. Their on-site survey must be made while the initial training program is in session. It will require a minimum of two full days. Additional time may be needed if there are several practical experience centers to be visited. Such time may be requested either by the AOTA or the sponsoring agency.

1. Preliminary arrangements shall be made by the training program director to insure that the survey team has adequate time for the following:

   a. Conference with the program director.

   b. Conference with the advisory committee chairman or his representative(s).

   c. Conference with key instructors.

   d. Private conference with the trainees as a group.

   e. Observation of teaching facilities and equipment, including those in associated hospitals and agencies.

   f. Auditing class sessions when possible.

   g. Review of required records and forms. (See XI.)

   h. Visits to centers for practical experience where the following information shall be available.

      1) Number and qualifications of personnel supervising trainees.
      2) A brief description of the program including average number of patients treated per day.
      3) A brief description of the center, if separate from the location of the training program.

C. Following the survey visit, the team submits a report to the AOTA Accreditation Committee for action. Copies of this committee's action with recommendations will be sent to the sponsoring organization. Considerable time may elapse between the survey visit and final action by the Accreditation Committee. If the program is approved by AOTA the graduates of the class surveyed (and those graduated during the period of approval) are then eligible to apply for certification as an occupational therapy assistant.

D. The agency will be billed by the AOTA for the survey visit (See "Fees for Training Program for Occupational Therapy Assistants").

X. CONTINUING APPROVAL

A. To maintain approval, a training program director is required to submit an interim report on each training program completed to the AOTA within one month of the completion of the program. (See "Training Program Report Form.")

B. Reapproval of the program is required every three years. Procedures to be followed are the same as those described for the initial survey. Implementation of previous recommendations, changes in program content, credentials of added personnel and graduates, and the interim reports will be considered.

XI. PERMANENT RECORDS

Permanent records shall include:

A. Justification of need for establishment of training program for occupational therapy assistants.

B. Agency Credentials

Resume of factors to confirm professional status of agency; accreditations held by the agency; and number of professional personnel and their status.

C. Staff Credentials

A file shall be maintained on each member of the permanent staff, supervisors of practical experience, and guest lecturers. Records on qualifications shall contain information on general and professional education, professional experience, and membership in professional organization. A suggested Faculty Qualification Form is appended and may be duplicated.

D. Trainee Records

A file shall be maintained on each trainee. The file shall include admission forms (See VIII, B, 2), attendance, grades, performance evaluation and other pertinent material. It shall be available to the survey team at the time of initial approval and the resurvey visits.

E. Minutes of meetings of advisory bodies.

This document replaces and combines "Requirements of an Acceptable Training Program for Occupational Therapy Assistants," Rev. Nov. 1962, and "A Guide for the Development and Administration of the Training Program for Occupational Therapy Assistants," Rev. Oct. 1961, Rev February 1965.

SAMPLE FORM

AMERICAN OCCUPATIONAL THERAPY ASSOCIATION
251 Park Avenue South, New York, N.Y. 10010

APPLICATION FOR APPROVAL OF TRAINING PROGRAM

FOR OCCUPATIONAL THERAPY ASSISTANTS

I. Organization

A. Name of sponsoring hospital, agency or organization _____

_____

_____
Address

Accredited by _____ Date: _____

B. Location of training program _____

_____

II. Financial support

A. State funds _____ C. Fees _____

B. Local _____ D. Other _____

III. Faculty members

A. Number of occupational therapists (OTR's) in addition to Director of Training Program

1. Academic instruction _____

2. Skills instruction _____

3. Practical experience _____

Number of individuals involved in 1, 2, and 3, above Full-time _____

Part-time _____

B. Number of instructors other than OTR's

Full-time _____ Part-time _____

IV. A. Dates of current training program _____

B. Enrollment capacity: Men _____ Women _____
Enrollment - Current Program: Men _____ Women _____

V. How frequently do you plan to offer the program? _____

Send to AOTA with:
Application fee - $10.00
Review material as listed in
Requirement IX-A
Revised Feb. 1967.

Signature: _____

Title: _____

SAMPLE FORM

AMERICAN OCCUPATIONAL THERAPY ASSOCIATION
251 Park Avenue South, New York, N.Y. 10010

TRAINING PROGRAM REPORT

OCCUPATIONAL THERAPY ASSISTANTS

I. Organization

A. Name of hospital or agency _____

_____
Address

B. Training program dates: from _____ to _____

C. Number enrolled: Men _____ Women _____

D. Number graduates: Men _____ Women _____

II. Was the program the same as the one approved by AOTA? Yes _____ No _____

If it differed, please list the changes (faculty, course content, number of hours location, etc.). Append to this report.

III. What are the approximate dates of the next program.

_____

Signature of program director _____

Signature of director of
hospital or agency _____

Date: _____

Please include a list of the names of graduates and send complete report to AOTA within one month of completion of training program.

8/62
(2/64 revision)

SAMPLE FORM

(NAME OF PROGRAM)

TRAINING PROGRAM FOR OCCUPATIONAL THERAPY ASSISTANTS

Faculty Qualification Form

Name: Dr. / Mr. / Miss / Mrs. _____

College: _____

Professional Courses: _____

Other training: _____

Other: (teaching positions, publications, etcetera)_____

_____

_____

Professional memberships: _____

Present position: _____

_____

Date: _____ Signature: _____

AOTA Training Program for Occupational Therapy Assistants
October 1961

SAMPLE FORM

(NAME OF PROGRAM)

UNIT OUTLINE

UNIT TITLE: _____ INSTRUCTOR _____

I. LENGTH OF UNIT _____

_____

_____

II. OBJECTIVES OF UNIT

_____

_____

_____

III. TEXTBOOKS (Source of material used by lecturer)

A. _____

B. _____

C. _____

D. _____

IV. LIST OF RECOMMENDED REFERENCES AND RESOURCES FOR TRAINEES

A. _____

B. _____

C. _____

D. _____

E. _____

F. _____

V. TEACHING TECHNIQUES USED

_____

_____

_____

VI. TOPICAL OUTLINE OF COURSE CONTENT (Please attach)

AOTA Training Program for Occupational Therapy Assistants
February 1965

AMERICAN OCCUPATIONAL THERAPY ASSOCIATION
251 Park Avenue South, New York, N.Y. 10010

TRAINING PROGRAM OUTLINE FOR OCCUPATIONAL THERAPY ASSISTANTS

The field of medicine is dedicated to the treatment and cure of emotionally and physically ill individuals. Occupational therapy is one of the disciplines making a significant contribution toward returning these persons to society or to their maximum level of function. Occupational therapy is unique to the extent that in its application it involves the patient as an active participant in the use and development of basic manual and social skills related to his immediate living experience and ultimate life goals. Through patient performance and/or response, the occupational therapist is able to evaluate work habits, endurance, motivation, abilities and underlying cultural and psychological factors which influence patient goals, potential adjustment and achievement.

A major problem confronting occupational therapy as it does all health professions today, is a serious shortage of qualified personnel. Because of the increasing urgency of the problem, the American Occupational Therapy Association has authorized the training of selected individuals to assist professional occupational therapists.

A recommended program outline has been developed to provide the framework on which the professional occupational therapist can build a detailed training program for the preparation of the occupational therapy assistant. Emphasis is placed on the treatment of patients with physical and psychosocial dysfunction. Provision is made for the inclusion of material related to the treatment of children, the aged and the retarded.

The duration of training shall be no less than 20 or more than 25 weeks unless prior concurrence is obtained from the American Occupational Therapy Association.

The program which follows requires a minimum of 750 clock hours to be allocated as follows:

Academic Instruction	260 hours
Skills Instruction	230 hours
Practical Experience	250 hours
Evaluation	10 hours

The distribution of suggested hours which follow are an indication of their relative importance and need not be followed exactly. The sequence of topics may also be adjusted to meet the requirements of the teaching methods used.

I. ORIENTATION — 30 hours

A. Introduction to course

1. Purpose

2. General Information

3. How to Study

B. Mans Need to Work and Leisure

C. To Occupational Therapy

1. History and Philosophy

   To include orientation to state, area, national and international professional organizations.

2. Role and Function

   To include ethics and why, where, by whom and under what auspices OT is administered. The contribution and training of volunteers should also be covered.

D. To Other Services in the Institution and Community

   To include such areas as the institution as a social system, Administration, Food Service and Dietetics, Nursing, Physical Therapy, Chaplaincy, Psychology. Social Service, Vocational Counseling, and others as appropriate.

E. The law as it relates to the patient, institution and employee.

II. HEALTH CONCEPTS 110 hours

A. Medical Terminology

B. Normal Growth and Development

   To include childhood, adolescence, adulthood and aging.

   1. Physical

   2. Personality Development - including normal defense mechanisms.

C. Normal Body Structure and Function

D. Information on and Management of Clinical Conditions commonly referred to occupational therapy.

   1. Physical Dysfunction

      To include psychological aspects with coverage of General Medical and Surgical, Neurological, Orthopedic and others.

   2. Psycho-social Dysfunction

      To include physical aspects with coverage of psychoses, neuroses character and personality disorders, developmental defects and others.

E. Emergency care and accident prevention.

III. OCCUPATIONAL THERAPY THEORY AND ITS APPLICATION 120 hours

To emphasize psychosocial and physical dysfunction at each stage of human development. How and what to observe and report should be included.

IV. SKILLS.

A. Developing skill in Interpersonal Relationships

To include knowledge and understanding of self, one to one interaction, the group process and group techniques.

B. Techniques of Teaching

C. Activities of Daily Living

To include self care, communications, positioning, transfer, homemaking, avocational pursuits and other pertinent activities.

D. Media

The number of hours devoted to a particular skill should be determined by the demands of the area culture and practice. Emphasis should be placed on the use and acquisition of equipment and materials as well as on preparation. Each skill should be developed to a point which permits follow through on the activity.

1. Woodworking
2. Applied Design and Creative Arts
3. Ceramics
4. Leatherwork
5. Jewelry and Metalwork
6. Sewing, Needlework, Weaving and minor skills
7. Socialization and Recreation
8. Surplus Materials
9. Optional

E. Utilization of Volunteers and Community Resources

V. SUPERVISED PRACTICAL EXPERIENCE 250 hours

Must include two types of experience: one psychosocial and one physical dysfunction. If additional assignments are determined to be necessary, additional time within the overall limitation may be added.

VI. EVALUATION AND COUNSELING 10 hours

To include individual and group counseling and a final assessment of each students knowledge and performance.

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Note: Other topics of general or particular importance may be included within the academic time limitation such as First Aid, Remotivation.

AMERICAN OCCUPATIONAL THERAPY ASSOCIATION

FUNCTION OF OCCUPATIONAL THERAPY ASSISTANTS

The preparation of the occupational therapy assistant equips him to fulfill the following functions and specifies the degree of supervision necessary by the graduate occupational therapist.

1. General Activity Programs:
   General activity programs are those designed to improve hospital milieu and increase patient morale. They are used to meet the normal needs of anyone for occupation and diversion. Activities include general recreation, such as movies, dances and parties and the non-specific use of music, library, arts and crafts, etc.

   It is advisable that the occupational therapy assistants have guidance and consultation from the graduate occupational therapist in this type of program.

2. Supportive or Maintenance Programs:
   Supportive or maintenance activity programs are those in which activities are performed by patients to maintain benefits of prior treatment, to encourage the highest level of function and rehabilitative goals.

   The occupational therapy assistant functions with guidance and consultation from the graduate occupational therapist in this type of program. He exercises a high degree of initiative, responsibility and independent action in planning and carrying out programs for patients referred for this level of activity.

3. Specific Treatment Programs:
   Specific treatment in occupational therapy for patients in the acute state of illness or disability means the use of activities to correct or improve specific pathology and involves controlled interaction with the patient for therapeutic results. The person administering treatment must have sufficient professional training to enable him to evaluate the patient's condition, plan and administer an appropriate program of treatment and report significant response and behavior to the referring physician.

   Specific treatment in occupational therapy should be administered only by a graduate occupational therapist.

The occupational therapy assistant functions only as an assistant to and under the direct supervision of a graduate occupational therapist in the treatment of patients referred for specific treatment.

If there is temporarily no graduate occupational therapist available, the occupational therapy assistant should use activities as indicated in the supportive or general type of program. The training of the occupational therapy assistant is not adequate in terms of medical background and knowledge to enable him to treat patients in the active or acute stage of illness or disability.

Revised April, 1964

AMERICAN OCCUPATIONAL THERAPY ASSOCIATION
251 Park Avenue South, New York, N.Y. 10010

GUIDE FOR SUPERVISION OF CERTIFIED OCCUPATIONAL THERAPY ASSISTANTS

Supervision is a process in which two or more people participate in a joint effort to establish, maintain and/or elevate a level of performance. One of the participants, the supervisor, possesses skill, experience and/or education in excess of those possessed by the other participant(s), the supervisee(s).

To maintain high standards of practice based on occupational therapy principles, supervision is essential. It should be provided in varying patterns as determined by the demands of the area of patient service and the competency of the individual concerned.

Occupational therapy services are provided by:

Occupational Therapists or - Professionally educated, qualified by registration and indicated by the initials, O.T.R. (Registered Occupational Therapist).

Occupational Therapy Assistants or - Technically educated in an approved program, qualified by certification and indicated by the initials C.O.T.A. (Certified Occupational Therapy Assistant).

Occupational Therapy Aides - Trained through apprenticeship or in-service assignments.

Provision for supervision is made at all levels of the profession. It is structured according to the specifications of the individual's position, level of preparation, depth of experience and the milieu within which he functions. The supervisor is responsible for the standard of work performed by the supervisee. Structures of supervision for the C.O.T.A. follow.

The C.O.T.A. is supervised by:

1. An O.T.R. - This is the preferred situation.
2. An experienced C.O.T.A. - With supervision and consultation from an O.T.R.
3. By someone designated by the supervising O.T.R. The supervising O.T.R. will maintain a continuing relationship with both the C.O.T.A. and the designated supervisor. (This is acceptable only in special situations where appropriate and when necessary).

In the practice of occupational therapy, the comparative desirability of the above structures of supervision may differ. The pattern used should be the one most suitable to the situation.

September 1967

AMERICAN OCCUPATIONAL THERAPY ASSOCIATION
251 Park Avenue South, New York, N.Y. 10010

FEES FOR TRAINING PROGRAM

FOR

OCCUPATIONAL THERAPY ASSISTANTS

The following fees* have been established to keep institution expenses for approval and/or consultation services as reasonable as possible.

Application fee for approval of program		$10.00
Survey fee (two-person team)	per day, per person	$25.00
Application fee for re-approval of program		$10.00
Re-approval survey fee (two-person team	per day, per person	$25.00
Consultation fee		To be determined by prevailing rate of institution visited.
Annual certified occupational therapy assistant membership dues (After graduation from approved program)		$10.00

* These fees, payable to the American Occupational Therapy Association, may be subject to change.

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